Completing a Tax Return Using Form 1040A to Claim a Dependent



In this simulation, you will take on the role of Jacob Hastings in order to learn how to claim a dependent on Form 1040A.

January 1 December 31 January 1 Your Filing Season
April 15

You are married to Emily. You have a daughter, Linda, who is 18 years old.

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You are an engineer. Emily does not work outside of the home. You, Emily, and Linda are U.S. citizens and live in the United States. Linda is a full-time student in her last year in high school. She lives at home. No one except Linda depends on you and Emily for income or support. No one else can claim you or Emily as dependents.

1 2 3 4 <mark>5</mark> 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

My Profile

Name: Jacob Hastings Employment: Engineer Marital status: Married

Spouse's name (if any): Emily, homemaker

Children: Linda, age 18

U.S. citizen: Yes

Other: Linda is a full-time student in her last year in high school. She lives at home. No one except Linda depends on you and Emily for income or support. No one else can claim you or Emily as dependents. Linda earned \$1,000 during the year. Except for \$1,000, you provided all of the support for Linda. You provided all of the costs to maintain the family home.

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Linda earned \$1,000 during the year. Except for \$1,000, you provided all of the support for Linda. You provided all of the costs to maintain the family home. When preparing your return, make choices that result in the lowest tax.

To review your personal information, click My Profile below.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

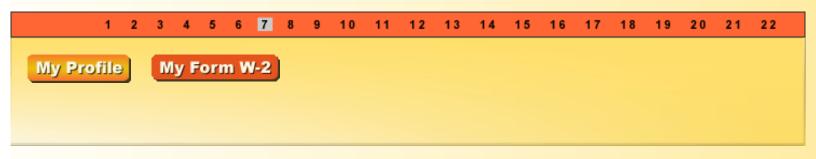
My Profile

January 1 December 31 January 1 Your Filing Season
April 15

It's the end of the tax year. You receive your Form W-2 from your employer. You earned \$43,211 from your job.

Note: Your employer is required to send your W-2 by January 31!

To review your Form W-2, click My Form W-2 below.



			_					
		a Employee's social security number 222-00-2156	OMB No. 154	15-0008	Safe, accurate, FAST! Use	?vfil		e IRS website v.irs.gov/efile.
	ridentification number 70912	(EIN)	_	1 Wa	ges, tips, other compensation \$43,211	2 Fee	deral income t	ax withheld \$2,733
	's name, address, and er Circle Enginee			3 So	cial security wages \$43,211	4 So	cial security ta \$2,	ax withheld 679.08
	iter Circle wn, US 10010	-		5 Me	edicare wages and tips \$43,211	6 Me	dicare tax wit	hheld 626.56
				7 So	cial security tips	8 Allo	ocated tips	
d Control r	umber			9 Ad	vance EIC payment	10 De	pendent care	benefits
e Employe	e's first name and initia	l Last name	Suff.	11 No	nqualified plans	12a Se	e instructions	for box 12
Jacob	R	Hastings				o d e		
Jacob	1.	r idstirigs		13 Statuto	ory Retirement Third-party yee plan sick pay	12b		
81 Tra	il's End				Sion play	Cod		
0	vn, US 10111			14 Otl	ner	12c		
Allyto	VII, OO 10111					C o d		
						12d		
						Cod		
f Employe	e's address and ZIP co	de				e		
15 State E	mployer's state ID num	nber 16 State wages, tips, etc.	17 State incom	ne tax	18 Local wages, tips, etc.	19 Local in	ncome tax	20 Locality name

Form W-2 Wage and Tax Statement

2007

Department of the Treasury-Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return. This information is being furnished to the Internal Revenue Service.

		_					
PAYER'S name, street address, city,	state, ZIP code, and telephone no.	Payer's RTN (optional)	OMB No. 1545-0112				
Anytown Credit Union 33 Circle Drive Anytown, US 10011		1 Interest income \$ 392.00 2 Early withdrawal penalty		Interest Income			
		\$	Form 1099-INT		_		
PAYER'S federal identification number	RECIPIENT'S identification number	3 Interest on U.S. Savings Bo	nds and Treas. obligation	ons	Сору В		
10-2231567	222-00-2156	\$	For Recipient				
RECIPIENT'S name		4 Federal income tax withheld	3	This is important tax			
Jacob R. and Emily Hasti	ngs	\$	\$		information and is being furnished to the Internal Revenue		
Street address (including apt. no.)		6 Foreign tax paid	7 Foreign country or	U.S.	Service. If you are		
81 Trail's End		\$	possession		required to file a return a negligence penalty or		
City, state, and ZIP code Anytown, US 10111		8 Tax-exempt interest	Specified private as bond interest	other sanction may be imposed on you if this income is taxable and			
Account number (see instructions)					the IRS determines that it has not been		
		l \$	l <u>\$</u>		reported		

Form 1099-INT

(keep for your records)

Department of the Treasury - Internal Revenue Service



You receive Form 1099-INT from the credit union. You earned \$392.00 in interest income from your savings account.

To review your Form 1099-INT, click My Form 1099-INT below.



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You have everything you need to file your taxes. You will be using Form 1040A in order to claim Linda as a dependent.

1040A								ue Service ax Re			200	7			_					
	$\overline{}$			and initia		ICOI	ne i	Last na		(99)	200		IRS Use	Only-	–Do n		or staple 4B No. 1			
Label	١.														You		l securit			
(See page 18.)	L A B E																			
		lf a joi	nt retum,	abonae,a	first name	e and In	itial	Last na	me						Spo	ouse's s	ocial sec	urity nun	nber	
Use the IRS label.	L														l _		<u> </u>			
Otherwise,	HERE	Home	address	(number a	and street)	i if you	have a P.	.O. box, see	page 18.				Apt.	no.			must er SSN(s)		A	
please print or type.	Ë	City, 1	own or po	ost office,	state, and	1 ZIP 00	de. If you	I have a for	elgn addre	ss, see par	e 18.				-		1.7			
Presidential		,					,										box be ir tax or		not	
Election Campa	aign	▶ Che	ck her	e if you	, or you	ır spo	use if fi	iling joint	ly, want	\$3 to g	to this	fund (se	e page	18)	\blacktriangleright		_	Spor	use	
Filima																				
Filing		1 [2 [☐ Sin ☐ Mar	gle ried fili	na iointl	lv (eve	en if on	lv one ha	d incom	ie)		lead of h f the qua								
	3	2 [Sin Mar	gle ried fili	na iointl	_								person						2
etatue		2 [□ Mar	ried fili	7 8	3 9	9 1		1 12	13	14	f the qua	lifying p	person	is a o	child bu	t not yo	ur deper	ident,	2
1 2		2 [□ Mar	ried fili	7 8	3 9	9 1	0 11	1 12	13	14	f the qua	lifying p	person	is a o	child bu	t not yo	ur deper	ident,	2
1 2		2 [□ Mar	ried fili	7 8	3 9	9 1	0 11	1 12	13	14	f the qua	lifying p	person	is a o	child bu	t not yo	ur deper	ident,	2
1 2		2 [□ Mar	ried fili	7 8	3 9	9 1	0 11	1 12	13	14	f the qua	lifying p	person	is a o	child bu	t not yo	ur deper	ident,	2
1 2		2 [□ Mar	ried fili	7 8	3 9	9 1	0 11	1 12	13	14	f the qua	lifying p	person	is a o	child bu	t not yo	ur deper	ident,	2

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Which filing status do you want to use?

- Married filing joint
- O Married filing separate

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

My Profile My Form W-2 My Form 1099-INT

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That's correct! Your filing status is married filing joint. It provides a lower tax rate than the married filing separate filing status.



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Are the Dependency Tests Met for Linda Hastings?

Dependent Taxpayer Test	•	yes	0	no			
Joint Return Test	•	yes	0	no			
Citizen or Resident Test	•	yes	0	no			
Relationship Test	•	yes	0	no			
Age Test	•	yes	0	no			
Residency Test	•	yes	0	no			
Support Test	•	yes	0	no			
Special Test for Qualifying Child of More Than One Person	0	yes	0	no	•	does rapply	ot

Can you claim Linda as a dependent on your tax return?

• yes • no

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

My Profile My Form W-2 My Form 1099-INT

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Use Form W-2 to enter your salary on Form 1040A. Enter your salary exactly as it appears on your W-2.

Enter salary: \$43211

Form 1040A	Department of the Treasury—Internal Revenue U.S. Individual Income Ta		2007 RS U	lse Only—Do not	t write or staple in this s	nana.				
	Your first name and initial	Last name	2001	/	OMB No. 1545-0074	_				
Label	Jacob R.	Hastings		Your	social security number	er e				
(See page 18.) L A	Jacob K.	пазинуз		2	222 00 2156					
B E	If a joint return, spouse's first name and initial	Last name		Spou	se's social security num	ber				
Use the LIRS label.	Emily C.	Hastings		2	222 00 1345					
Otherwise E	Home address (number and street). If you have a P.I	t. no.	You must enter	A						
please print R	81 Trail's End City, town or post office, state, and ZIP code. If you	have a femiliar address	40		your SSN(s) above.	_				
or type.	Anytown, US 10111	have a foreign address, see page	18.		king a box below will r	not				
Presidential Election Campaign										
Filing status Check only one box. The status of the stat										
Exemptions	6a Vourself. If someone of	an claim you as a de	ependent, do no	t check	Boxes checked on	2				
	box 6a.				6a and 6b					
	c Dependents:			(4) √if qualify	No. of children					
	c bependents.	(2) Dependent's social	(3) Dependent's relationship to	child for chil	ld • lived with	1				
If more than six	(1) First name Last name	security number	you	tax credit (se page 21)	ee you did not live					
dependents,	Linda L. Hastings	222 : 00 : 7755	daughter	✓	with you due					
see page 21.					to divorce or separation					
					(see page 22)					
					Dependents on 6c not					
				H	entered above	—				
			C.		Add numbers on lines	3				
	d Total number of exemption	is claimed.			above >	بحبا				
Income	7 Wages, salaries, tips, etc.	Attach Form(s) W-2.	0,	7	7					
Attach Form(s) W-2		C								
here. Also	8a Taxable interest. Attach S			8	la	-				
attach Form(s)	b Tax-exempt interest. Do n		8b	<u> </u>	la					
1099-R if tax	9a Ordinary dividends. Attach : b Qualified dividends (see page 2)		9b	9	d	-				
was withheld.	10 Capital gain distributions (an	1	n					
Married was	140 IDA	See page 20).	ddb. Tovoble on	- n. m.t		_				
Hir	See Box 1 on your Fo	rm W-2								



Use your Form W-2 to enter your federal tax withheld. Enter your tax withheld exactly as it appears on your W-2.

Enter federal tax withheld: \$
2733

Form 8880. 34 Add lines 29 through 33. These are your total credits. 35 Subtract line 34 from line 28. If line 34 is more than line 28, enter -0 36 Advance earned income credit payments from Form(s) W-2, box 9. 37 Add lines 35 and 36. This is your total tax. 38 Federal income tax withheld from Forms W-2 and 1099. 39 2007 estimated tax payments and amount applied from 2006 return. 39 40a Earned income credit (EIC). 40a Nontaxable combat pay election. 40b	0,700					
34 Add lines 29 through 33. These are your total credits. 35 Subtract line 34 from line 28. If line 34 is more than line 28, enter -0 36 Advance earned income credit payments from Form(s) W-2, box 9. 37 Add lines 35 and 36. This is your total tax. 38 Federal income tax withheld from Forms W-2 and 1099. 39 2007 estimated tax payments and amount applied from 2006 return. 39 40a Earned income credit (EIC). 40a b Nontaxable combat pay election. 40b	-	33	Retirement savings contributions credit. Attach			
34 Add lines 29 through 33. These are your total credits. 35 Subtract line 34 from line 28. If line 34 is more than line 28, enter -0 36 Advance earned income credit payments from Form(s) W-2, box 9. 37 Add lines 35 and 36. This is your total tax. 38 Federal income tax withheld from Forms W-2 and 1099. 39 2007 estimated tax payments and amount applied from 2006 return. 39 40a Earned income credit (EIC). 40a b Nontaxable combat pay election. 40b			Form 8880.	_		
36 Advance earned income credit payments from Form(s) W-2, box 9. 36 37 Add lines 35 and 36. This is your total tax. 38 Federal income tax withheld from Forms W-2 and 1099. 38 39 2007 estimated tax payments and amount applied from 2006 return. 39 you have qualifying hild, attach chedule b Nontaxable combat pay election. 40b		34	Add lines 29 through 33. These are your total cred	34		
37 Add lines 35 and 36. This is your total tax. 38 Federal income tax withheld from Forms W-2 and 1099. 39 2007 estimated tax payments and amount applied from 2006 return. 39 40a Earned income credit (EIC). 40a b Nontaxable combat pay election. 40b		35	Subtract line 34 from line 28. If line 34 is more than lin	35		
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you have qualifying hild, attach chedule 2007 estimated tax payments and amount applied from 2006 return. 39 40a Earned income credit (EIC). 40a b Nontaxable combat pay election. 40b		37	Add lines 35 and 36. This is your total tax.	_	- 37	
you have qualifying hild, attach chedule applied from 2006 return. 39 40a Earned income credit (EIC). 40a b Nontaxable combat pay election. 40b		38	Federal income tax withheld from Forms W-2 and 1099.	38		
qualifying hild, attach chedule 40a Earned income credit (EIC). 40a b Nontaxable combat pay election. 40b		39	2007 estimated tax payments and amount			
hild, attach chedule b Nontaxable combat pay election. 40b]	applied from 2006 return.	39		
chedule b Nontaxable combat pay election. 40b	qualifying hild_attach	40a	Earned income credit (EIC).	40a		
		b	Nontaxable combat pay election. 40b			
41 Additional child tax credit. Attach Form 8812. 41	IC.	41	Additional child tax credit. Attach Form 8812.	41		
42 Add lines 38, 39, 40a, and 41. These are your total payments. ► 42		42	Add lines 38, 39, 40a, and 41. These are your total	payments.	42	
efund 43 If line 42 is more than line 37, subtract line 37 from line 42.	efund	43	If line 42 is more than line 37, subtract line 37 from	line 42.		
This is the amount you overpaid. 43	0.0.10		This is the amount you overpaid.		43	

Hint: See Box 2 on your Form W-2.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

My Profile My Form W-2 My Form 1099-INT

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Use your Form 1099-INT to enter your interest income on your Form 1040A. Enter your interest exactly as it appears on your 1099-INT.

Entenintenest in some		
Enter interest income:	\$ 392	

Form		Department of the Treasury-Internal Revenue	e Service						
1040A		U.S. Individual Income Ta	ax Return (99)	2007 IRS U	se Only-	-Do not wifi	te or staple in this s	грасе.	
Label		Your first name and Initial	Last rame		-		OMB No. 1545-0074	4	
(See page 18.)	I. I					Your soc	dal security numbe	or.	
(see page 16.)	A B	Jacob R.	Hastings			222	00 21	56	
		If a joint return, spouse's first name and initial	Last name			8pouse's	social security num	nber	
Use the	L	Emily C.	Hastings			222 00 1345			
IRS label.	빝	Home address (number and street). If you have a P.C		u must enter	_				
Otherwise, please print	Ř 8	81 Trail's End				▲ you	ur SSN(s) above.	_	
or type.	l • [City, town or post office, state, and ⊠P code. If you	have a foreign address, see pag	e 18.		Checking	a box below will	not	
Presidential	\Box	Anytown, US 10111					our tax or refund.		
Election Campa	aign 🕽	 Check here if you, or your spouse if fil 	ing jointly, want \$3 to go	to this fund (see pag	ge 18)	▶ □	You Spoo	use	
Filing		1 Single		4 Head of house	hold (wit	h qualifying	person). (See pag	e 19.)	
status		2 Married filing jointly (even if only	one had income)				but not your deper	ndent,	
Check only		3 Married filing separately. Enter s	pouse's SSN above and	enter this child					
one box.		full name here. ►		5 Qualifying wick	ow(er) wi	th depende	ent child (see page	20)	
Exemption	ns	6a ☑ Yourself. If someone c	an claim you as a c	dependent, do no	t chec	k)	Boxes checked on	2	
•		box 6a.				}	6a and 6b		
		b Z Spouse			1.0 6	J	No. of children		
		c Dependents:	(2) Dependent's social	(3) Dependent's		qualifying for child	on 6c who: • Iived with	4	
		(1) First name Last name	security number	relationship to you		eee) fiber	you	<u> </u>	
If more than six		Linda L. Hastings	222 : 00 : 7755		page 21)		did not live		
dependents, see page 21.		Linda L. Hastings	222 : 00 : 7755	daughter	-	<u>~</u>	with you due to divorce or		
			- : : -		_	 	separation (see page 22)		
			-		_	౼			
			+ + +		_	H –	Dependents on 6c not		
					 	H -	entered above		
							Add numbers		
		d Total number of exemption	s claimed.	36			on lines above >	3	
Income								_	
		7 Wages, salaries, tips, etc.	Attach Form(s) W-2			7		1	
Attach		Trages and the property							
Form(s) W-2 here, Also		8a Taxable interest, Attach So	chedule 1 if require	d.	l .	8a			
attach		b Tax-exempt interest. Do n		8b					
Form(s)		9a Ordinary dividends. Attach &		d.		9a			
1099-R if tax		b Qualified dividends (see page 1)	ge 25).	9b					
was withheld	1.	10 Capital gain distributions (s	see page 25).			10			
		44 - IDA		48b. Thursble on					

Hint: See Box 1 on your Form 1099-INT.



Since you have no other sources of income, you have completed your tax return. All that's left to do is review your return.

To review your return, click My Tax Form below.

12 13 14 15 17 18 21 10 11 19 20 22 My Form 1099-INT My Tax Form My Profile My Form W-2

1040A		U.S	. Individual Income T	ax Re	turn	(99)	2007	RS Use Only-	—Do	not write	e or staple in this sp	oace.
Label		Your fire	st name and initial	Last na	me			`,	·	О	MB No. 1545-0074	
(See page 18.)	ᅵ								Y	our soc	ial security number	r
	A B	Jacob I		Hasti					¦	222	social security number	
Use the	E	Emily (t return, spouse's first name and initial	Last na					١	222	00 134	
IRS label.	н		address (number and street). If you have a P.			3.		Apt. no.	 		must enter	, ·
Otherwise, please print		81 Trai	l's End						1		r SSN(s) above.	
or type.	E	City, to	wn or post office, state, and ZIP code. If you	have a for	eign add	ress, see pag	je 18.		Ch	ecking	a box below will n	ot
Presidential	\bigcup	_	vn, US 10111			. 4			ch		our tax or refund.	
	ign j		ck here if you, or your spouse if f	iling joint	ly, war	nt \$3 to go					You Spou	
Filing		1 _	」Single ☑ Married filing jointly (even if on	ly one he	nd inno	ma)					person). (See page ut not your depend	
status Check only		3	Married filing separately. Enter	-		,	4.44.4.44.4.4	child's name			at not your acpoint	dont,
one box.			full name here. ▶	орошос (3 0011	above an	5 Qualifying	widow(er) w	ith d	epende	nt child (see page	20)
Exemption	าร	6a	✓ Yourself. If someone of	can cla	im yo	u as a d	dependent, do	not chec	k)	Boxes checked on	2
		b	box 6a. Spouse								6a and 6b	
			Dependents:				(3) Dependent	r's (4) √i			No. of children on 6c who:	
			(1) First name Last name		epender curity n	nt's social number	relationship t	o child		(see	lived with you	1
If more than six			L. Hastings	222	00	7755	,	pa	age 2	1)	• did not live	
dependents, see page 21.		Lillua	L. Hasunys	222	. 00	1100	daughter				with you due to divorce or	
											separation (see page 22)	
											Dependents	
									\Box		on 6c not entered above	
											Add numbers	
		d	Total number of exemption	ns clain	ned.						on lines above ▶	3
Income											10011	
Attach		_7	Wages, salaries, tips, etc.	Attach	Forn	n(s) W-2				7	43211	00
Form(s) W-2		8a	Taxable interest. Attach S	chedul	e 1 if	require	4			8a	392	00
here. Also attach			Tax-exempt interest. Do I							ou		
Form(s)		9a	Ordinary dividends. Attach	Schedu	ıle 1 i					9a		
1099-R if tax was withheld			Qualified dividends (see p			_,	9b			_		
		10	Capital gain distributions	(see pa	ige 28	0).	dab. Tauable			10		
If you did not get a W-2, see		11a	distributions. 11a				11b Taxable (see page			11b		
page 24.		12a	Pensions and					amount		110		
Enclose, but do not attach, any			annuities. 12a				(see pa			12b		
payment.												
		13	Unemployment compensa	ation an	nd Ala	iska Per			6.	13		
		14a	Social security benefits.				14b Taxable (see page			14b		
			DOTIONS. 14a				(300 pa	gc 20).		140		
		15	Add lines 7 through 14b (fa	ır right (colum	ın). This	is your total in	come.		15	43603	00
Adjusted		40		0.0			10					
gross		16 17	Educator expenses (see p		5).		16 17			-		
income		18	IRA deduction (see page 2 Student loan interest dedu		see r	nage 31)				-		
			Cladent loan interest dout		,550 F	- ~g · · · ·)	0			-		
		19	Tuition and fees deduction	n. Attac	h Fo	rm 8917	. 19			_		
		20	Add lines 16 through 19.	These a	are yo	our tota l	adjustments			20		_
		21	Subtract line 20 from line	15 Thi	ie ie v	our adi i	ustad arnes ii	ncome	•	21	42602	00
		41	Cabhact into 20 HOTH IIITE	10. 111	is is y	oui auj	usicu gruss II	iconie.		۱ ک	43603	00

Department of the Treasury-Internal Revenue Service

Form

Form 1040A	(2007					Pa	age 2
Tax,	22	Enter the amount from line 21 (adjusted gross inc	come).		2	2 43603	00
credits,							
and	23 a		Blind Total box				
payments			Blind J checked				
Standard	D	If you are married filing separately and your adductions, see page 32 and check here		≥ 23b	П		
Deduction	24	Enter your standard deduction (see left margin).	45	200	Щ,	10700	00
• People who	<u>25</u>	Subtract line 24 from line 22. If line 24 is more th	an line 22 ent	er -0-	$\overline{}$	25 32903	00
checked any	26	If line 22 is \$117,300 or less, multiply \$3,400 by the				02300	- 00
box on line 23a or 23b or		claimed on line 6d. If line 22 is over \$117,300, see t				10200	00
who can be	27	Subtract line 26 from line 25. If line 26 is more th					
claimed as a dependent,		This is your taxable income.			> 2	.7 22703	00
see page 32.	28	Tax, including any alternative minimum tax (see p	page 32).		2	2626	00
All others:	29	Credit for child and dependent care expenses.					
Single or Married filing		Attach Schedule 2.	29				
separately,	30	Credit for the elderly or the disabled. Attach					
\$5,350		Schedule 3.	30				
Married filing jointly or	31	Education credits. Attach Form 8863.	31				
Qualifying	32	Child tax credit (see page 37). Attach Form 8901 if required.	32				
widow(er), \$10,700	33	Retirement savings contributions credit. Attach	32				
Head of	33	Form 8880.	33				
household, \$7,850	34	Add lines 29 through 33. These are your total cre			 3	34	
(41,555	35	Subtract line 34 from line 28. If line 34 is more than		0		35 2626	00
	36	Advance earned income credit payments from Fo	orm(s) W-2, box	x 9.		86	
	37	Add lines 35 and 36. This is your total tax.			▶ 3	37 2626	00
	38	Federal income tax withheld from Forms W-2 and 1099	9. 38	2733	00		
	39	2007 estimated tax payments and amount					
If you have a qualifying	40	applied from 2006 return.	39				
child, attach	40a	Earned income credit (EIC).	40a				
Schedule EIC.	<u>b</u>	Nontaxable combat pay election. 40b Additional child tax credit. Attach Form 8812.	41				
	42	Add lines 38, 39, 40a, and 41. These are your tot			▶ 42	2 2733	00
Deferred	43	If line 42 is more than line 37, subtract line 37 fro			72	2 2700	- 00
Refund		This is the amount you overpaid.	711 11110 12.		43	3 107	00
Direct	44a	Amount of line 43 you want refunded to you. If Form 888	8 is attached, ch	eck here >	<u> </u>	4a 107	00
deposit? See page 53 and fill in	▶ b	Routing number 2 3 4 5 6 5 4 3 2 ▶ c Type: ✓	Checking :	Savings			•
44b, 44c,	▶ d	Account A F A F A F A F A					
and 44d or Form 8888.	45	number 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4 5 4					
	45	Amount of line 43 you want applied to your 2008 estimated tax.	45				
Amount	46	Amount you owe. Subtract line 42 from line 37.		how			
you owe		to pay, see page 54.			▶ 46	6	
	47	Estimated tax penalty (see page 54).	47				
Third party	[Oo you want to allow another person to discuss this return with	the IRS (see page	e 55)? Y e	es. Cor	mplete the following.	No
designee	[Designee's Phone	,	Persona		ication	
		ame ► no. ► (Inder penalties of perjury, I declare that I have examined this return and a)	number		and to the hest of my	
Sign	k	nowledge and belief, they are true, correct, and accurately list all amounts	and sources of incor	ne I received d	uring the	e tax year. Declaration	
here Joint return?		f preparer (other than the taxpayer) is based on all information of which our signature Date	Your occupation	y knowledge.		Daytime phone number	er
See page 18.							
Keep a copy for your	3	pouse's signature. If a joint return, both must sign. Date	Spouse's occupation	on		<u>'</u>	
records.							
Paid		reparer s	Date	Check if		Preparer's SSN or PTIN	
preparer's	_	ignature		self-employed			
use only	У	irm's name (or ours if self-employed),		EIN		1	
Jiny		ddress and ZIP code		Phone n	10. (()	



Based on your completed tax return, enter your total tax for the year exactly as it appears on your 1040A.

Enter total tax: \$ 2626

Hint: See Line 37 on Form 1040A.

10 11 12 14 18 8 13 15 16 17 19 20 21 22 My Form W-2 My Profile My Form 1099-INT My Tax Form

January 1 December 31 January 1 Your Filing Season
April 15

Correct! Your total tax is \$2,626.00. Are you getting a refund or do you owe more tax?

- Refund
- O Owe more taxes

Hint: See Line 37 on Form 1040A.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

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January 1 December 31 January 1 Your Filing Season
April 15

Yes! Line 44a on your Form 1040A shows that your refund is \$107. Lines 44b, c, and d indicate that your refund will be directly deposited into your checking account.

Now you are ready to e-file your tax return with the IRS. Click the e-file button below to continue.



1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

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Your Tax Year
January 1

December 31 January

Your Filing Season

April 15

If you were actually filing your taxes using e-file, the last step would be signing the return. You can submit your signature by actually signing Form 8453 and sending it to the IRS, or by using Self-Select PIN (Personal Identification Number) if you are eligible. The Self-Select PIN is made up of any five numbers (except all zeros) that you choose to enter as your electronic signature. You select your PIN by providing your adjusted gross income from your previous year's tax return for verification purposes. Depending on the version of the software you are using, you may be asked to provide your date of birth in addition to your adjusted gross income. Signing your return using Self-Select PIN is the simplest and fastest way to submit your signature. You do not need to mail in a paper signature, and you receive an immediate acknowledgement that your tax return was received.

Learn more about self-selecting a PIN by visiting the IRS Web site.

Now click the forward arrow to finish filing Jacob's return.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

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January 1 December 31 January 1 April 15

Congratulations, Jacob! You've successfully filed your return by the tax filing deadline.